

# iTrent Self Service User guide

## Welcome

This is the User Guide for iTrent Self Service. Self Service is a tool that allows all University of Exeter staff to view and, in some cases, update some of the information that the University's Human Resources database, iTrent HR, holds on you and your position.

Please use the menu to the left to navigate this User Guide. If you cannot find the solution to any problems you are having in this User Guide then please contact [SID](#)

**To log in to the iTrent Self Service system,  
click on this link:**

[https://staff.exeter.ac.uk/hrpr\\_ess/ess/](https://staff.exeter.ac.uk/hrpr_ess/ess/)

**Use your University username and password to log in.**

If you are using a mobile device:

- Android – Go to options and tick 'Request desktop site'
- IOS – Tap the URL and drag down to access 'Request desktop site'

### IMPORTANT SECURITY ADVICE

As this Self Service system includes some very sensitive information about you it is important that you use it responsibly to ensure that the security of your personal information is maintained. You should therefore always log out of Self Service once you have finished using it and should never let anyone know your University username & password.

To log out of Self Service always click on 'Logout' in the top right-hand corner. Alternatively, please ensure you close the browser or tab as this will log you out automatically.

If you notice any information stored on the iTrent system is incorrect and you cannot correct yourself, please complete and return form [PD49](#).

If you experience any problems or would like to leave any feedback on your experience, please contact [SID](#).

# Navigation of iTrent Self Service

iTrent Self-Service is split into 5 sections with the heading of My Details, My Holiday, My Pay & Benefits, My Employment, Career & Development (see highlighted tabs below).

The screenshot shows the iTrent Self-Service portal. At the top, there is a navigation bar with five tabs: 'My Details', 'My Holiday', 'My Pay & Benefits', 'My Employment', and 'Career & Development'. The 'My Details' tab is highlighted in yellow. To the right of the tabs is a user profile icon. Below the navigation bar, a blue header area displays 'Hello Chris' and 'You last logged in 0 minutes ago'. Below this, there are two large photographs of the University of Exeter campus. Under the photos, a 'Quick links' section is visible, containing two columns of links. The left column includes 'Annual leave days to hours change FAQ', 'ePayslips Information', 'User Guide and FAQs', and '"How we use your Information"'. The right column includes 'View Latest Payslip', 'Book Annual Leave', 'IMPORTANT SECURITY ADVICE - please read', and 'More links from self service...'. Each link has a right-pointing arrow, except for the last one which has a dropdown arrow.

Quick links	
Annual leave days to hours change FAQ	▶
ePayslips Information	▶
User Guide and FAQs	▶
"How we use your Information"	▶
View Latest Payslip	▶
Book Annual Leave	▶
IMPORTANT SECURITY ADVICE - please read	▶
More links from self service...	▼

\*Quick links are liable to change from time to time.

By clicking on these different headings you can view and amend a variety of details.

**My Details** – Your personal details and contact information can be amended here eg change of name, address and sensitive information which allows us to monitor Equality and Diversity information.

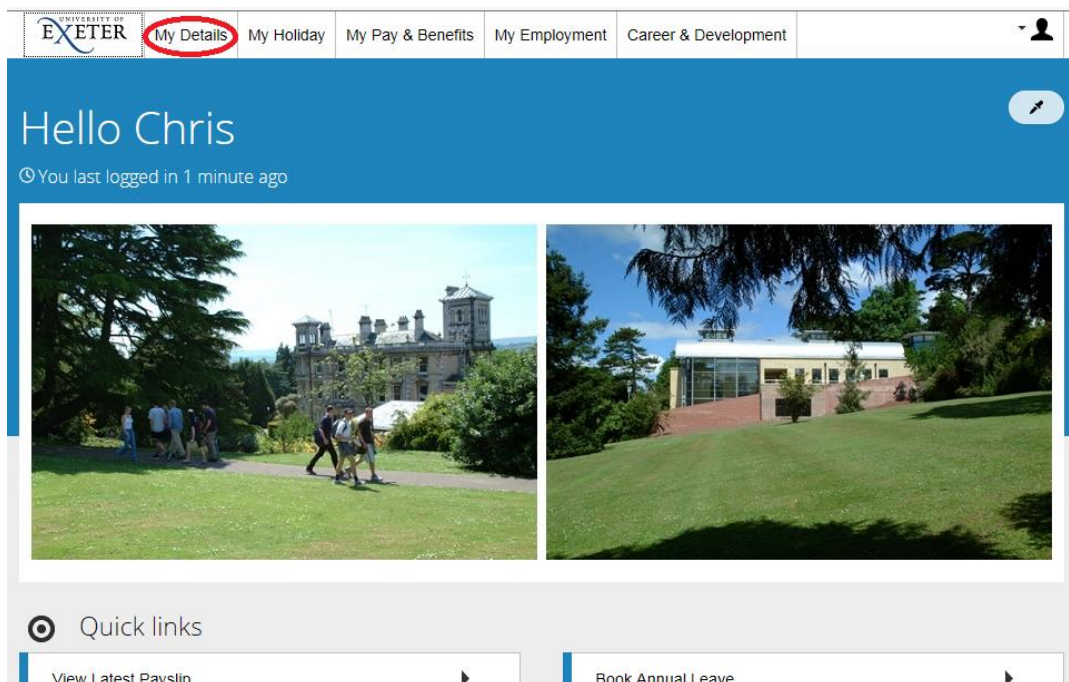
**My Holiday** – This area allows you to enter and amend holiday bookings. For details on how to book and view annual leave click [here](#).

**My Pay & Benefits** – For viewing and downloading Payslips and P60's.

**My Employment** – This will show your current and historic positions plus qualification details held within HESA details. If any details of your current position are incorrect you should advise HR Services by completing form [PD49](#).

**Career & Development** – Any training that has been undertaken or booked will show here plus the ability to book onto future Learning Events. For details on how to book courses click [here](#).

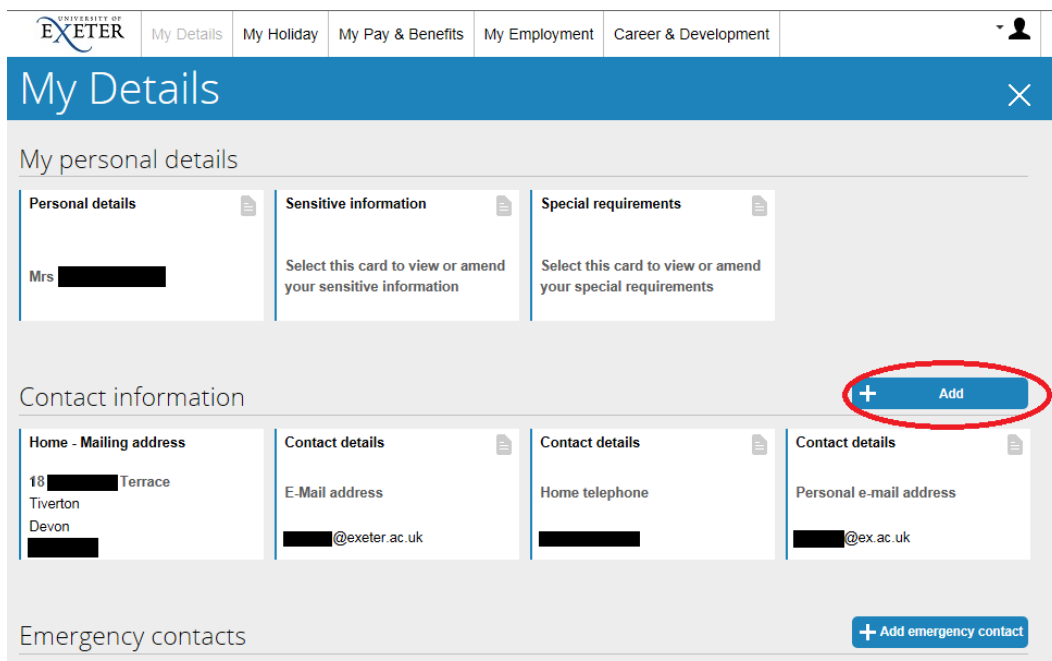
# Updating Personal Details



Go to 'My Details' (circled in red above)

This screen shows your personal information and contact details including emergency contacts.

## Adding a new address or contact details



To update your address details or add additional contact details eg mobile number, click on 'Add' (circled in red above).

Add address

Add contact details

This will bring up the following options

For new address select 'Add address'.

## Address details



Address type

Home



Line 1

18 Roberts Street

Line 2

Exeter

Line 3

Devon

Line 4

Line 5

Postcode

EX4 4QJ



Country

United Kingdom




Enter the address details and

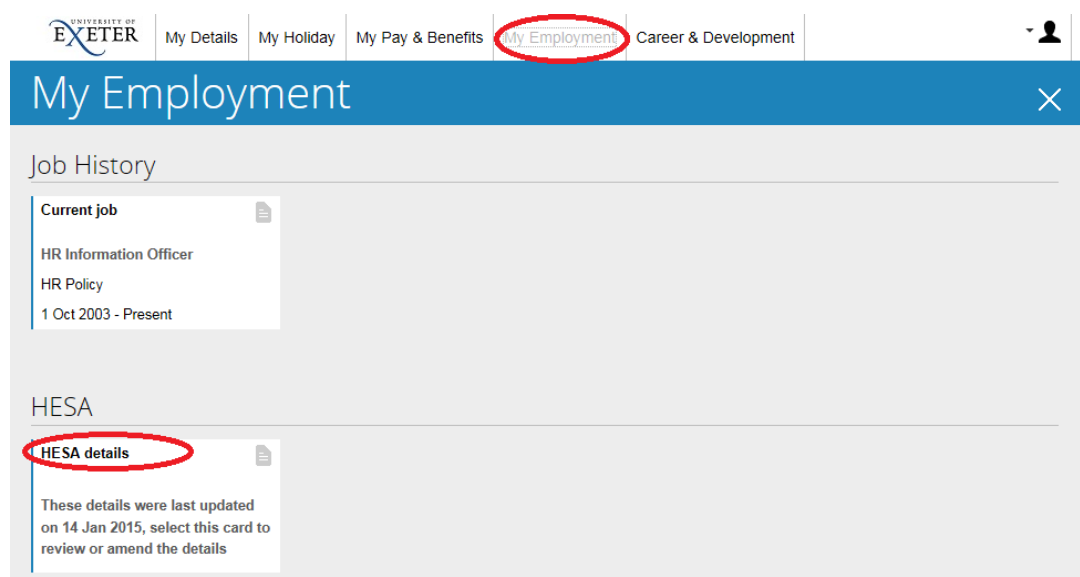
click on

Save

To add new contact details follow the instructions above but select 'Add contact details'.

For amending other existing contact details and personal information click on the *edit* icon  .

# Updating Academic Teaching Qualifications



UNIVERSITY OF EXETER

My Details My Holiday My Pay & Benefits **My Employment** Career & Development

## My Employment

Job History

**Current job**

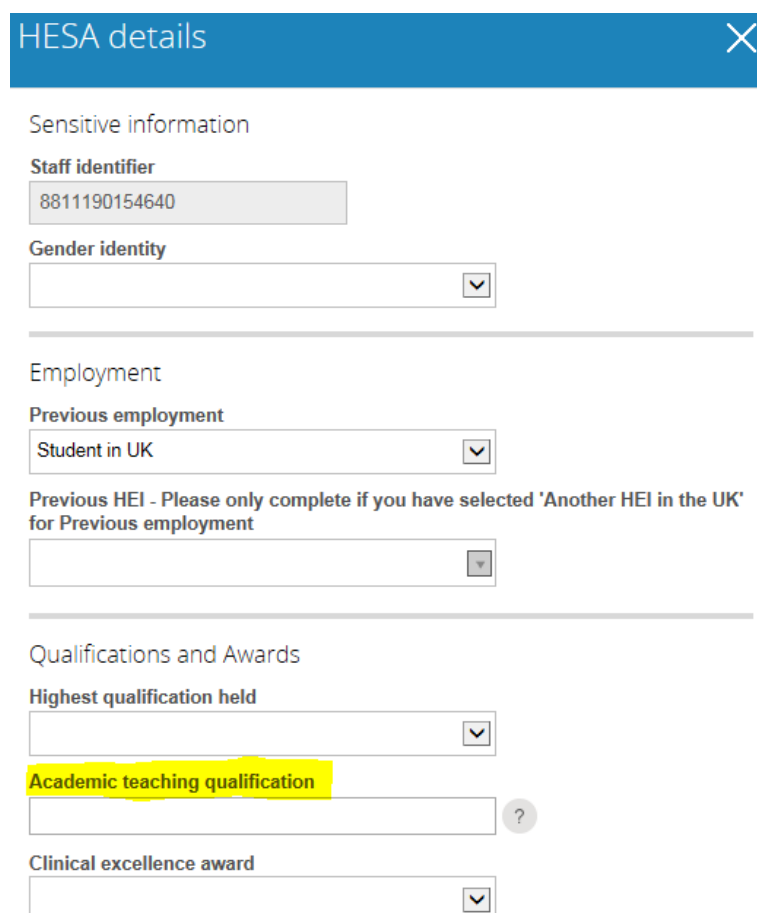
HR Information Officer  
HR Policy  
1 Oct 2003 - Present

**HESA**

**HESA details**

These details were last updated on 14 Jan 2015, select this card to review or amend the details

Go to 'My Employment' and then click on 'HESA details' (circled in red above).



## HESA details

Sensitive information

**Staff identifier**

8811190154640

**Gender identity**

**Employment**

**Previous employment**

Student in UK

**Previous HEI - Please only complete if you have selected 'Another HEI in the UK' for Previous employment**

**Qualifications and Awards**

**Highest qualification held**

**Academic teaching qualification**

**Clinical excellence award**

## ACADEMIC TEACHING QUALIFICATION

You can enter up to 6 Academic Teaching Qualifications. Start by entering a key word such as 'Fellow' or 'PGCE' this will then give you a list of possible options. To enter further qualifications, up to a maximum of 6, click in the box and enter a key word as before.

Please note that if you hold no academic qualifications this option is available and should be entered.

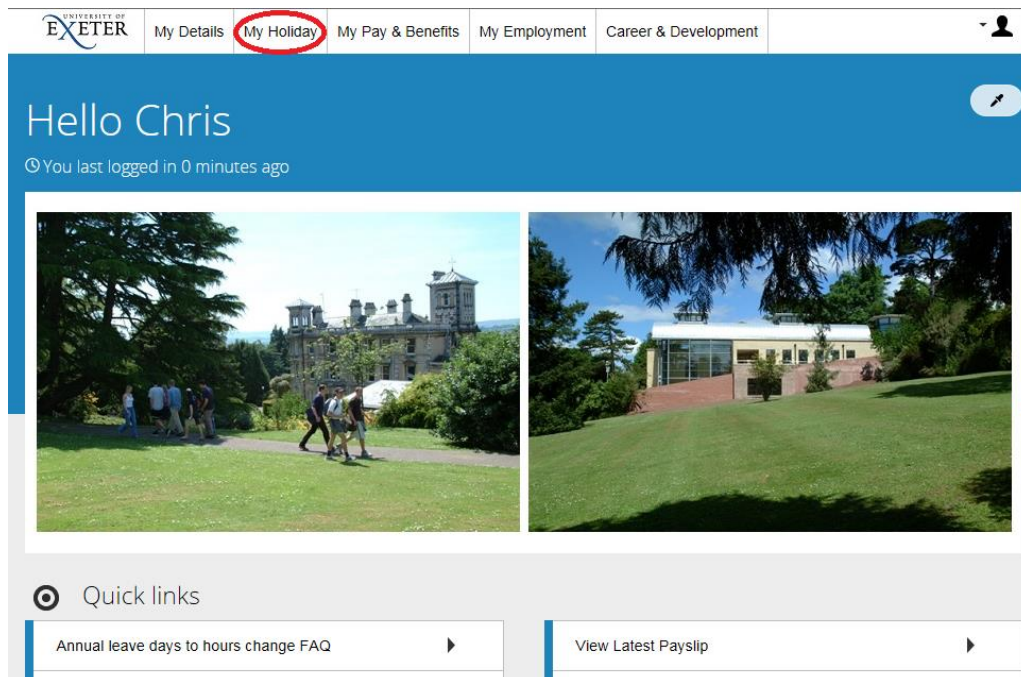
A full list of available options is shown below.

As well as updating your academic qualifications please ensure all other details on this screen are correct.

- Accredited as a teacher of their subject by a professional UK body
- Completed a UK accredited institutional provision in teaching in the HE sector
- Holder of a National Teaching Fellowship Scheme Individual Award
- No qualification held
- Other UK accreditation or qualification in teaching in the HE sector
- Overseas accreditation or qualification for any level of teaching
- PGCE in HE, secondary education, further education, life long learning or equivalent
- Recognised by the HEA as a Fellow/Principal Fellow/Senior Fellow/Associate Fellow

# Annual Leave

## Viewing Holiday Dates



Go to 'My Holiday' (circled in red above)

This screen allows you to view all discretionary holiday that is scheduled to take place.

The 'My Holiday' page displays 'Holidays - 70.08 hours available'. It includes buttons for 'Holiday balances', 'My calendar', a magnifying glass icon (circled in red), a plus sign, and 'Add holiday'. Below these is a table of holiday bookings.

Start date	End date	Duration	Type	Position	Authorisation
17 Aug 2015	28 Aug 2015	43.8	Annual leave	HR Information Officer	Authorised
29 Jun 2015	10 Jul 2015	43.8	Annual leave	HR Information Officer	Authorised
9 Apr 2015	9 Apr 2015	7.3	Annual leave	HR Information Officer	Authorised
17 Feb 2015	17 Feb 2015	7.3	Annual leave	HR Information Officer	Authorised
16 Dec 2014	18 Dec 2014	3.0	Annual leave	HR Information Officer	Authorised
17 Nov 2014	21 Nov 2014	3.0	Annual leave	HR Information Officer	Authorised
11 Aug 2014	22 Aug 2014	6.0	Annual leave	HR Information Officer	Authorised
9 Jun 2014	20 Jun 2014	6.0	Annual leave	HR Information Officer	Authorised

This includes annual leave both 'authorised' and those 'awaiting authorisation' where the request has not yet been approved by your Line Manager.

From this screen you can click any future periods of leave and either change the dates (unless the *Authorisation* status is 'Authorised') or delete it.



If you need to amend or delete a leave booking that took place in the past (for example, if you accidentally selected the wrong month or year), please contact the Annual Leave Administrator for your College or Service, or contact [SID](#).

In order to view other leave such as Bank Holidays and Closure Days you should click on the  (circled in red above).



If you leave the fields blank and just click on [Search](#) it will bring back all bank holidays, closure days (shown as bank holidays) and annual leave days in the current, past and future 12 months with the newest at the top.

Holiday search

Start date

End date


Filter results:

Holiday type

<All>


Bank holiday

Annual leave



Authorisation status

Not refused



Results:

Bank holiday

26 Dec 2016 - 27 Dec 2016

HR Information Officer

Duration:7.3

Bank holiday

29 Aug 2016 - 29 Aug 2016

HR Information Officer

Duration:0

Bank holiday

30 May 2016 - 30 May 2016

HR Information Officer

Duration:0

Bank holiday

Search

Cancel

Filter the results by clicking on 'Bank holiday' or 'Annual leave' under Holiday Type or to show a specific period enter the start and end dates of the period you want to cover.



When you book, amend or cancel a period of annual leave, you will receive a confirmation via email. Your Reporting Manager will also receive a notification via email in order to authorise, reject or put your request on hold. [Once your Reporting Manager has changed the status of your annual leave request \(i.e. authorised, rejected or placed it on hold\), you will receive another confirmation via email.](#)



## Booking annual leave

On the Homepage, click on 'My Holiday'

To request a new period of annual leave either:

- Click on  on the 'My Holiday' screen **OR**
- Click on  on the Holiday Balances screen

This will open the 'Holiday Details' screen:

**Absence type:** Select 'Annual Leave' from the drop down list.

**Holiday period:** There are 3 options, 'Part day', 'Full day' or 'More than one day'. Depending on which one you choose, other context-sensitive menus may appear.

- **Part day:** This option allows you to request part of a single day's annual leave. If you select this, you will be prompted for the Start Date and another menu ('Morning or afternoon') will appear. To request a half day's annual leave, select 'Morning' or 'Afternoon' from this menu.
- **Full day:** This option allows you to request a full single day's annual leave. You will be prompted for the Start Date.
- **More than one day:** This option allows you to request one or more consecutive full or part-days' annual leave. If you select this, you will be prompted for the start and end dates of your annual leave. 2 menus for 'Full day or part day' will also appear to allow you to specify whether the start and end dates of your annual leave will be taken as full or half-days' annual leave.

For example, if you would like to request annual leave from the afternoon of Tuesday 24<sup>th</sup> March 2015 and until the end of the day on Thursday 26<sup>th</sup> March 2015 (returning to work on Friday 27<sup>th</sup> March 2015), you would complete the form as follows:

### Holiday details

Absence type


Annual leave

Holiday period

More than one day

Start date

24/03/2015




Full or part day

Afternoon

Last date of holiday

26/03/2015



Full or part day

Full day

Notes



Use the 'Notes' field to add any extra information relating to your annual leave request. Your Reporting Manager will be able to read this information when they receive your request.

Finally, to submit your annual leave request, click on the  button

You will receive a confirmation via email and your Reporting Manager will also receive a notification via email in order to authorise, reject or put your request on hold. Once your Reporting Manager has changed the status of your annual leave request (i.e. authorised, rejected or placed it on hold), you will receive another confirmation via email.

## Viewing Holiday Balances


This screen allows you to view your total and outstanding annual leave entitlement.

On the Homepage, click on 'My Holiday'

Click on

Holiday balances

The Holiday Balances screen shows the following information:

Holiday Balances				
 The balance takes account of all recorded annual leave (including any awaiting authorisation), bank holidays, and University closure days				
HR Information Officer - Annual leave				
Holiday Period	Entitlement	Taken	Scheduled	Balance
1 Jan 2015 - 31 Dec 2015	201.48 hours	14.6 hours	116.8 hours	70.08 hours
1 Jan 2016 - 31 Dec 2016	179.58 hours	0 hours	7.3 hours	172.28 hours

- **Holiday period:** The calendar year to which the annual leave figures relate
- **Entitlement:** Your total annual leave allowance in hours, including 8 bank holidays and 3 University closure days – pro rata where part-time
- **Taken:** Any leave (including bank holidays and closure days) that has already taken place.
- **Scheduled:** Any leave that is due to take place in the future. This includes any holiday requests still awaiting authorisation and any bank holidays / closure days that have not yet taken place
- **Balance:** The total of outstanding discretionary annual leave still to be taken during the current calendar year.

Your annual leave entitlement is calculated using the Contractual Hours and Working Pattern information recorded on the Current Jobs screen under My Employment. You must ensure this information is accurate (Please see 'Annual Leave – Checking your Details' for more information about how to do this).

The hours and days recorded will determine what is deducted from your leave entitlement. For example, someone is employed on a 0.6 FTE contract and works a standard 7.3 hour day on Monday, Wednesday and Friday each week. If they request annual leave from Monday to Thursday, their annual leave balance will be reduced by a total of 14.6 hours (2 days), i.e. Monday and Wednesday. The annual leave system will ignore Tuesday and Thursday as they are not contracted to work on these days and therefore do not count towards your annual leave entitlement.

Where a Bank Holiday and Closure Day falls on a day you are contracted to work and you do not work that day (because it is a Bank Holiday or Closure Day), the number of hours you were contracted to work that day will be deducted from your total leave entitlement. If a Bank Holiday and Closure Day falls on a day you were not contracted to work no deduction is made.

## Annual Leave - Checking Your Details

If you think that your annual leave has not been calculated correctly you should start by checking that the information held about you and your position are correct.

On the homepage, click on 'My Employment'

On the Employment screen, click on 'Current Jobs' under Job History.

Current job details

Job details

Position name

HR Information Officer

Department

HR Policy

Start date

01/10/2003

Payroll reference

50335

Contractual hours

21.90

Work pattern

21:54 M0 T7:18 W7:18 T7:18  
F0 S0 S0

Manager

Mr Andrew Wasniowski - HR IT Systems Manager

Location details

Address type

Mailing

Line 1

HR Services

Line 2

Northcote House

Line 3

Streatham Campus

Line 4

Line 5

Postcode

Country

United Kingdom

Cancel

On the Current Job details screen, check that your Reporting Manager, Contractual Hours and Working Pattern are correct. When you request annual leave, it is important that these details are up-to-date because:

- Your Reporting Manager is responsible for authorising your annual leave request. If this is not correct, your request will not be sent to the right person
- Your Contractual Hours is used to calculate your total available annual leave
- Your Working Pattern is used to calculate the duration of each period of annual leave

All the information held in Self Service about your current jobs is read only; therefore if you find that any of the information held in this section is incorrect then you can inform us of this by completing form [PD49](#) and sending it to the HR Services Administration team.

## FAQs - Annual Leave

**Please note: This section only applies to staff who book annual leave using iTrent HR Self Service**

- [I haven't requested any annual leave for the new leave year but iTrent says that I have 'scheduled' 80.3 hours.](#)
- [I am part-time and I don't understand the leave entitlement shown in iTrent HR.](#)
- [I work part-time, Monday to Wednesday: what happens when a Bank Holiday falls on a Monday?](#)
- [I work part-time and part of my working hours are flexible.](#)
- [I have two part-time jobs with the University: how do I book my annual leave?](#)
- [I work mornings only: how do I book one morning as annual leave?](#)
- [I am leaving my job in the School of X to start another job in the School of Y on 1 June 2010: what happens to my annual leave?](#)
- [I started working for the University part way through the holiday year: how does iTrent HR calculate my leave entitlement?](#)
- [I am employed on a fixed term contract until 30 September, but iTrent HR says I have a full year's leave entitlement.](#)
- [What happens to my leave if I haven't used all of it by 31 December?](#)
- [I joined the University before 1999 and have some 'banked leave': is this recorded in iTrent HR?](#)
- [I work term-time: why can't I see my annual leave in iTrent HR Self Service?](#)
- [I was sick while on leave, what should I do?](#)
- [What happens if I try to book more annual leave than I have left in my balance?](#)
- [I have requested by final 'full day' of annual leave for the current leave year but iTrent HR shows I have an untaken leave balance of 0.3 hours – what does this mean?](#)
- [My manager is away and unable to approve my leave request](#)
- [My job with the University requires me to work on a Bank Holiday: how does iTrent deal with this?](#)
- [I don't have a regular working pattern. Can I use iTrent to record annual leave?](#)

**Q - I haven't requested any annual leave for the new leave year but iTrent says that I have 'scheduled' 80.3 hours.**

A – These are in respect of bank holidays and closure days that fall on your working days – pro rata for part-time staff.

Further information about Bank Holidays and University Closure Days can be found at: <http://www.exeter.ac.uk/staff/employment/leave/annual/>

**Q - I am part-time and I don't understand the leave entitlement shown in iTrent HR.**

A - Your annual leave entitlement will be calculated as follows:

- staff in grades A to D: 284.7 hours multiplied by your FTE (eg 0.5 for half-time)
- staff in grades E and above: 299.3 hours multiplied by your FTE (eg 0.5 for half-time)

iTrent HR will then look at your working pattern to see which bank holidays and closure days fall on days when you would normally work and deduct this from your leave 'balance' so that the figure shown as 'Balance' in the 'Holiday Balances' screen at the beginning of each year, (before you have entered any leave requests) shows how many hours can be taken by agreement between you and your manager.

All staff should check that the 'work pattern' in iTrent HR (go to 'My Employment' then click on 'Current Jobs') correctly records their days and hours they work each day.

**Q - I work part-time, Monday to Wednesday: what happens when a Bank Holiday falls on a Monday?**

A - Bank Holidays and University Closure Days are pre-loaded into iTrent HR. When a Bank Holiday or Closure Day falls on a day you normally work and you do not work that day (because it is a Bank Holiday or Closure Day), iTrent HR will deduct from your leave 'balance' the number of hours you were contracted to work that day. If a Bank Holiday and Closure Day falls on a day you were not contracted to work no deduction is made.

**Q - I work part-time and part of my working hours are flexible.**

A - Following her maternity leave, Lucy agreed with the University that she would return to work for 3.5 days each week. 3 days (Tuesday, Wednesday, Thursday) are worked in the office and the other half day is worked flexibly, at home, between Friday and Monday. This is recorded as a notional Friday morning in the iTrent HR 'work pattern' field.

When Lucy takes a week's holiday, she should request 'more than one day' and enter the dates for Tuesday to Friday – this will deduct 25.55 hours from her balance.

Where bank holidays and closure days cover an entire week eg Christmas, iTrent HR will correctly deduct 25.55 hours from Lucy's balance.

However, iTrent HR will assume that Lucy is taking Good Friday as a bank holiday and deduct 3.65 hours from balance when she should have discretion over when to take this leave. This means that the Leave Administrator for her College or Service will need to make an adjustment to her leave balance in iTrent HR.

**Q - I have two part-time jobs with the University: how do I book my annual leave?**

A - iTrent HR will aggregate together your annual leave entitlement for the two positions, so that it appears as a single record when you log in to iTrent HR Self Service.

Example: you work Monday, Tuesday, Wednesday in one position and Thursday and Friday in your second position.

1. You want to request a single day of leave. If you request a Monday, iTrent HR will send an email to the line manager for your first (Monday to Wednesday) appointment. If you request a Thursday, iTrent HR will send an email to the line manager for your second (Thursday to Friday) appointment.
2. You want to request a whole week of leave. If you enter this as a single request, iTrent HR will send an email to both your line managers but either of them can authorise the request by clicking on the 'authorise' button. To avoid this, you should enter two requests – ie one request for Monday to Wednesday and another request for Thursday to Friday. Then each line manager will receive a separate email inviting them to authorise your leave request.

**Q - I work mornings only: how do I book one morning as annual leave?**

A - Staff working on a part-time basis should check that the 'work pattern' in iTrent HR (go to 'Employment' then click on 'Current Jobs') correctly records their days and hours they work each day. When you request a 'full day' of leave, iTrent HR automatically takes account of the number of hours you work that day. So if your 'work pattern' in iTrent HR shows 3:30 hours for a Monday (because you work from 9am to 12:30pm), when you request a 'full day' of leave for a Monday, iTrent HR will deduct 3.5 hours from your holiday 'balance'. You should, therefore, request a 'full day' of leave if you are requesting the leave on a day when you do not wish to attend work at all.

**Q - I am leaving my job in the College of X to start another job in the College of Y on 1 June 2010: what happens to my annual leave?**

A - If you are moving to another job with the same hours (eg full-time to full-time), your untaken holiday balance will transfer to your new appointment.

If your hours are changing (eg you are moving from 0.5fte to full-time), your leave entitlement for the year will be recalculated so that 5/12 leave accrues at 50% of the full-time entitlement and for the remainder of the year leave accrues at the full-time rate. Similarly, if you are transferring from a grade D position to a grade E position, your leave entitlement for the year will be recalculated. Your untaken holiday balance will transfer to your new appointment.

At the earliest opportunity after you are notified of your new appointment, you should speak to both your current line manager and your new line manager to discuss your annual leave arrangements.

Also, please check your leave entitlement once you have started your new position and contact [sidhr@exeter.ac.uk](mailto:sidhr@exeter.ac.uk) if it is not correct.

**Q - I started working for the University part way through the holiday year: how does iTrent HR calculate my leave entitlement?**

A - The Conditions of Employment ([http://admin.exeter.ac.uk/personnel/terms\\_conds.shtml](http://admin.exeter.ac.uk/personnel/terms_conds.shtml)) state that (section 8(g)): *The annual leave entitlement for staff joining or leaving the employment of the University during the course of the year is proportionate to their completed service during the leave year.*

Fixed days (ie Bank Holidays and University Closure Days) are additional – ie someone starting work (in a grade E full-time role) for the University on 1 March would be entitled to Good Friday and Easter Monday (and the Bank Holidays and Closure Days which follow) in addition to their 10/12 of the full year leave entitlement. So iTrent HR would show an entitlement of 255.5 hours and an untaken balance of 182.5 hours.

Someone who started on 1 December (in a grade E full-time role) would be entitled to the full Christmas closure regardless of their accrued holiday.

**Q - I am employed on a fixed term contract until 30 September, but iTrent HR says I have a full year's leave entitlement.**

A - If your employment at the University is expected to end during the current calendar year (for example if you are employed on a fixed term contract or are planning to retire this year), iTrent HR calculates annual leave entitlement based on their actual employment end date, which is only entered once it is certain that an employee is leaving.

However, the Conditions of Employment ([http://admin.exeter.ac.uk/personnel/terms\\_conds.shtml](http://admin.exeter.ac.uk/personnel/terms_conds.shtml)) state that (section 8(h)): *If an employee whose employment ends during the year has taken more days of leave than s/he has accrued up to their final date of employment, then a deduction will be made from their final salary payment.*

To avoid the University having to reclaim any overpayment from fixed term staff who leave before the end of the leave year (31 December), both the employee and their manager should ensure that they do not request/authorise leave which takes them over their pro-rata entitlement for the part of the year covered by their current contract of employment. The ready reckoner (<http://www.exeter.ac.uk/staff/employment/leave/annual/>) on the Annual Leave pages of the HR Services website can be used to calculate the entitlement up to the end of the current fixed term contract.

**Q - What happens to my leave if I haven't used all of it by 31 December?**

A - You should note that there is no entitlement to carry forward leave, but your Dean/Head of College/Service or other senior manager may give you permission to carry forward up to 36.5 hrs (equivalent of 5 days') leave where it is not possible (eg for operational reasons) for you to take all your leave entitlement before 31 December.

Although iTrent will automatically carry forward up to 36.5 hrs unused annual leave to the next calendar year, it is essential that you obtain your manager's agreement to this. Any balance carried forward must be used in the first 4 months of the new calendar year. For further information see section 8(i) of the Conditions of Employment ([http://admin.exeter.ac.uk/personnel/~docs/conditions\\_of\\_employment.pdf](http://admin.exeter.ac.uk/personnel/~docs/conditions_of_employment.pdf))

**Q - I joined the University before 1999 and have some 'banked leave': is this recorded in iTrent HR?**

A - Banked leave, which only applies to a limited number of support staff who joined the University before 1999, is not recorded within iTrent HR – your College or Service should maintain a separate record of this.

**Q - I work term-time: why can't I see my annual leave in iTrent HR Self Service?**

A - The Conditions of Employment ([http://admin.exeter.ac.uk/personnel/terms\\_conds.shtml](http://admin.exeter.ac.uk/personnel/terms_conds.shtml)) state that (section 8(l)) staff working on a term-time basis may not take leave during term-time and that their pro-rata paid leave entitlement is taken on unspecified days during the vacation periods. Consequently, 'term-time staff' do not have discretion over when they can take their annual leave.

**Q - I was sick while on leave, what should I do?**

A - If, following your return to work, you are able to present a medical certificate covering your absence, the period of annual leave you were unwell can be reinstated. If any of the leave you previously requested has already passed then it will not be possible for you to cancel the request via iTrent Self Service and it will be necessary for the 'Leave Administrator' for your College/Service to make the adjustment in iTrent HR. For further information see section 10(f) of the Conditions of Employment ([http://admin.exeter.ac.uk/personnel/terms\\_conds.shtml](http://admin.exeter.ac.uk/personnel/terms_conds.shtml))

**Q - What happens if I try to book more annual leave than I have left in my balance**

A - iTrent HR will allow you to request more leave than you have left in your balance. This will show on both the confirmation email you receive and the email sent to your line manager that your balance is negative (marked in red). Clearly employees should ensure that they do not request more leave than they are entitled to take.

With effect from 31 December 2015 any negative balances will be carried forwarded and deducted from the new calendar year.

**Q - I have requested my final 'full day' of annual leave for the current leave year but iTrent HR shows I have an untaken leave 'balance' of 0.3 hours – what does this mean?**

A - iTrent HR will calculate leave entitlement and the figure will not always equate to a full or half day and a small remainder will be shown. This remainder will automatically be carried forward to the following calendar year.

The rounding arrangements normally applied by the University via the ready reckoner on the Annual Leave pages of the HR Services website (see 'Staff joining/leaving mid-year')



and 'Information for part-time staff' at <http://admin.exeter.ac.uk/personnel/leave.shtml>) will not apply.

**Q - My manager is away and unable to approve my leave request?**

A - You should forward the email you have been sent by iTrent HR confirming your leave request to your manager's manager, asking them to approve your request. Your manager's manager should respond direct to you by email and copy their response to the iTrent Leave Administrator for your College/Service who will input the necessary action in iTrent HR.

If your line manager is going to be away from an extended period of time, they can log into iTrent as a People Manager user and arrange for all leave requests to be redirected to another member of staff to be actioned.

**Q - My job with the University requires me to work on a Bank Holiday: how does iTrent deal with this?**

A - iTrent assumes that if a Bank Holiday or Closure Day falls on a day you normally work, you are on holiday on that day and a deduction is made to your leave 'balance'. If in fact you are required to work, then it will be necessary for the Leave Administrator for your College/Service to mark this as 'Not taken' in iTrent so that your leave 'balance' is corrected and you are able to request alternative time off on another day.

**Q - I don't have a regular working pattern. Can I use iTrent to record annual leave?**

A - iTrent uses your working pattern to calculate how much leave should be deducted for each full or half day of leave taken as annual leave, bank holiday or University closure day. If you do not have a regular working pattern, iTrent is not suitable for you.

Please note that iTrent can record multi-week working patterns. So if you work regular hours on a recurring rota basis, you can use iTrent to record annual leave. Please contact [sidhr@exeter.ac.uk](mailto:sidhr@exeter.ac.uk) if you want to check your working pattern is correct.

# Booking Learning Events

## Viewing booked and completed courses

The screenshot shows the University of Exeter portal home page. At the top, there is a navigation bar with the following items: My Details, My Holiday, My Pay & Benefits, My Employment, and Career & Development (which is circled in red). Below the navigation bar, the user is greeted with 'Hello Chris' and a message 'You last logged in 0 minutes ago'. There are two large images showing campus scenes. Below the images, there is a 'Quick links' section with two columns of links. The first column contains 'Annual leave days to hours change FAQ' and 'ePayslips Information'. The second column contains 'View Latest Payslip' and 'Book Annual Leave'.

Quick links	
Annual leave days to hours change FAQ	View Latest Payslip
ePayslips Information	Book Annual Leave

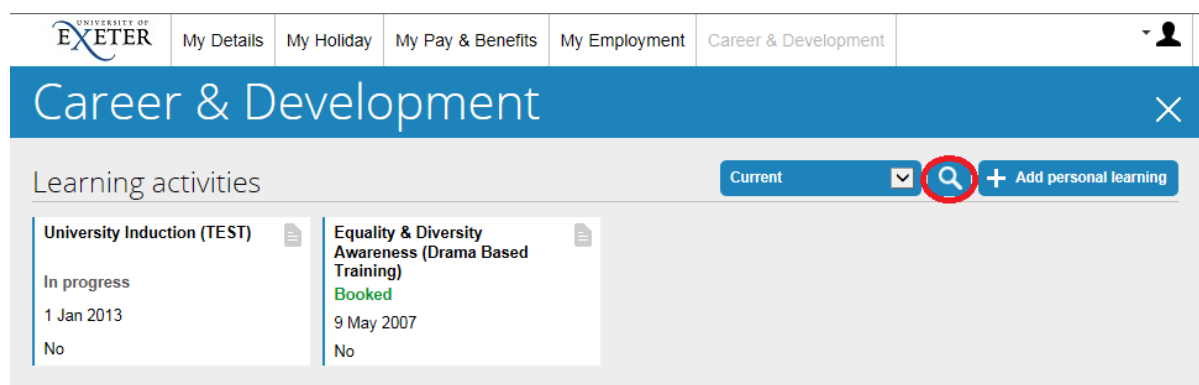
Go to the 'Career & Development' screen (circled in red above).


The screenshot shows the 'Career & Development' screen. At the top, there is a navigation bar with the following items: My Details, My Holiday, My Pay & Benefits, My Employment, and Career & Development. Below the navigation bar, the title 'Career & Development' is displayed. Underneath, there is a 'Learning activities' section. At the top of this section, there is a filter bar with the following items: 'Current' (circled in red), a search icon, and a '+ Add personal learning' button. Below the filter bar, there are two columns of learning activities. The first column is titled 'University Induction (TEST)' and shows 'In progress', '1 Jan 2013', and 'No'. The second column is titled 'Equality & Diversity Awareness (Drama Based Training)' and shows 'Booked', '9 May 2007', and 'No'.

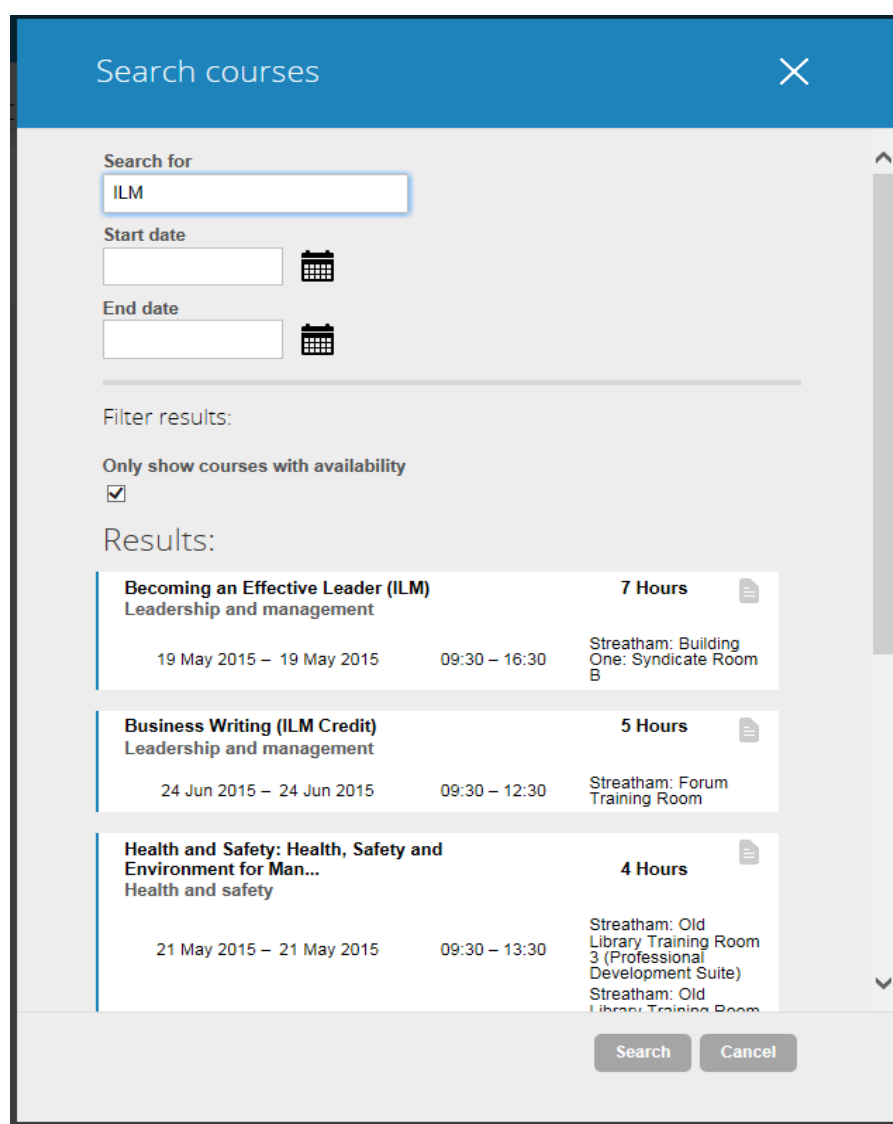
Learning activities	
University Induction (TEST)	Equality & Diversity Awareness (Drama Based Training)
In progress	Booked
1 Jan 2013	9 May 2007
No	No

This screen allows you to view all of your learning activities whether current, booked, completed, cancelled or on a waiting list. To change the view you can do this by using the filter to modify your view (circled in red above).

## How to Book a Course



Use the search icon  (circled in red above) to search for a course. (Alternatively you can visit the [course calendar](#) on the website to identify the course title you wish to search for).



Enter a key word into the 'Search for' box eg 'Health' or 'ILM'. In the 'Results' section click on your chosen course to see the course's full details.

Course details

×

Health and Safety: Health, Safety and Environment for Managers (ILM)  
- Part 1

This course will inform managers about the legal framework in safety and the environment. It will teach delegates how to develop assurance systems in their areas of responsibility. Delegates must attend both Part 1 and Part 2 on separate days (9-1pm), complete the coursework and complete the written test at the end of Part 2.

Who is it for?  
For University Managers with responsibility for the Health and Safety of staff or a service.

What is it about?  
This ILM level 2-3 course focuses managers on understanding their duties with

21 May 2015 – 21 May 2015

09:30 – 13:30

☰

Streatham: Old Library Training Room 3 (Professional Development Suite)

Cost: 50.00

9 spaces available

14 Jul 2015 – 14 Jul 2015

09:30 – 13:30

☰

Streatham: Old Library Training Room 3 (Professional Development Suite)

Cost: 50.00

11 spaces available

Add to waiting list

Cancel

The 'Course details' screen will show the full details for the course you have chosen including how many spaces are available. If there are no spaces available for your chosen course you can use the **Add to waiting list** button to add yourself to the waiting list.

Please note that we contact the waiting list when new dates are arranged.

To book yourself on your chosen course click on the appropriate course – this will take you to the 'Course booking details' screen.



## How to Cancel a Course

The screenshot shows the University of Exeter Career & Development portal. At the top, there is a navigation bar with links: My Details, My Holiday, My Pay & Benefits, My Employment, and Career & Development. The 'Career & Development' link is active. Below the navigation bar is a blue header with the text 'Career & Development' and a close button (X). Underneath the header is a section titled 'Learning activities'. On the right side of this section are buttons for 'Current', a dropdown arrow, a search icon, and a '+ Add personal learning' button. Below these buttons is a table with two columns. The first column is titled 'University Induction (TEST)' and the second is titled 'Equality & Diversity Awareness (Drama Based Training)'. The first row shows 'In progress' for the first course and 'Booked' for the second. The second row shows dates: '1 Jan 2013' and '9 May 2007'. The third row shows 'No' for both.

University Induction (TEST)	Equality & Diversity Awareness (Drama Based Training)
In progress	Booked
1 Jan 2013	9 May 2007
No	No

Click on the course you wish to cancel.

The screenshot shows the 'Course booking details' screen for the course 'Health and Safety: Health, Safety and Environment for Managers (ILM) - Part 1 (60045)'. The course information section includes the date '21 May 2015 – 21 May 2015', the venue 'Streatham: Old Library Training Room 3 (Professional Development Suite)', the time '09:30 – 13:30', and the cost '£50'. Below this is the 'Event booking details' section. It contains a 'Cancel reason - see <http://ex.ac.uk/cancel> for charges' dropdown menu, which is currently set to 'Booked on to this event in error'. Below the dropdown is a red circle around the 'Join waiting list' checkbox, which is currently unchecked. The 'Overview' section provides details about the course, including its purpose, who it is for, what it is about, and what you will get out of it.

**Course booking details**

**Health and Safety: Health, Safety and Environment for Managers (ILM) - Part 1 (60045)**

Course information

Date: 21 May 2015 – 21 May 2015

Venue: Streatham: Old Library Training Room 3 (Professional Development Suite)

Time: 09:30 – 13:30

Cost: £50

Event booking details

Cancel reason - see <http://ex.ac.uk/cancel> for charges

Booked on to this event in error

Join waiting list ☐

Overview

This course will inform managers about the legal framework in safety and the environment. It will teach delegates how to develop assurance systems in their areas of responsibility. Delegates must attend both Part 1 and Part 2 on separate days (9-1pm), complete the coursework and complete the written test at the end of Part 2.

Who is it for?

For University Managers with responsibility for the Health and Safety of staff or a service.

What is it about?

This ILM level 2-3 course focuses managers on understanding their duties with regards to safety, compliance and environment.

What will I get out of it?

At the end of the two parts, delegates will be able to confidently identify hazards, assess risk, self assess their work area to provide assurance that all necessary safety provisions are in place, according to the needs of the department. Delegates will be confident in collating evidence and will understand their managerial role in safety management at the University.

On the 'Course booking details' screen enter the reason for cancellation and select the **Save** button.

You can, at the same time as cancelling, join the waiting list for the course. You will then be automatically notified of further dates as they become available.





# FAQs – iTrent Self Service

- [Who should I contact if my employment details are incorrect?](#)
- [What should I do if my date of birth is incorrect?](#)
- [Will any changes that i make to my personal information be passed on to relevant third parties \(i.e. the Inland Revenue, Sodexho etc.\)?](#)
- [What should I do if there is an error on my payslip?](#)
- [My name has changed, can I change my University e-mail address to reflect this?](#)
- [How should I inform the University of any changes to my internal telephone number?](#)
- [I don't have a University user Login, how can I access my details?](#)
- [I don't have regular access to a PC at my normal place of work.](#)
- [Who has access to my details?](#)
- [How secure is the information held on the System?](#)
- [Why can't I log in using my mobile device?](#)

## **Q - Who should I contact if my employment details are incorrect?**

A – Details relating to your current job, or your current working location cannot be amended through Self Service. You should therefore complete form [PD49](#) which will need to be signed off by the manager of your College/Service and returned to the HR Services Administration Team.

## **Q - What should I do if my date of birth is incorrect?**

A – We are unable to offer you the option of being able to change your date of birth through Self Service; therefore if the date of birth shown in the system is incorrect you should contact the [Human Resources Administration team](#) to request that they correct it; you will be asked to provide documentary evidence to confirm this

## **Q - Will any changes that I make to my personal information be passed on to relevant third parties (i.e. the Inland Revenue, Sodexho etc.)?**

A – The University does not pass on details of any changes that you make to your address or other personal information to any third parties (i.e. the Inland Revenue, Sodexo etc.). It is therefore your responsibility to inform any relevant third parties of any relevant changes to your address or other personal information.

## **Q - What should I do if there is an error on my payslip?**

A – If you are worried that there is an error on one of your payslips you should firstly double check your own records to make sure that this is a genuine error, then if you still believe there is you should contact the Payroll Office to discuss

## **Q - My name has changed, can I change my University e-mail address to reflect this?**

A – Once you have updated your name on the iTrent HR System via Self Service this information will feed through and update your email address. NB This does not happen immediately.

## **Q - How should I inform the University of any changes to my internal telephone number?**

A – Internal telephone numbers are managed centrally and you should contact the [SID](#) helpdesk to request any changes.

**Q - I don't have a University user Login, how can I access my details?**

A – Self Service is only to staff on the main University payroll, and is not available to staff on claims.

**Q – I don't have regular access to a PC at my normal place of work.**

A – You can access self service from any PC connected to the University network or via the University's VPN.

The University has 200 "Open Access" PCs that are available for you to use. Details of location and availability can be found on the following [link](#)

**Q – Who has access to my details?**

A - Staff in HR and Finance Services have access to the information required to carry out their specific roles.

Additionally some Line Managers have People Manager access to iTrent which allows them to view person and position-related information for the staff who report to them and Senior Managers and Administrators in your College or Service may be able to view limited information about all staff in their College or Service.


No staff outside Finance Services or HR Services will have access to your bank details. Senior staff outside these areas will only have access to the information related to your salary, not payslip details, i.e. tax details or deductions.

Access to information about other employees is only permitted if:

- There is a genuine business need for an individual to access this information
- The iTrent HR user understands and agrees to comply with Data Protection legislation and the University's IT regulations

Other staff cannot see your details through Self Service – and you can't see theirs. For further information, the University's HR Services Data Protection Statement can be viewed here [http://admin.exeter.ac.uk/personnel/data\\_trenthr/data.shtml](http://admin.exeter.ac.uk/personnel/data_trenthr/data.shtml)

**Q – How secure is the information held on the System?**

A – The data within Midland iTrent is held within an Oracle Database. Access to data within the system requires a iTrent user ID. Each user ID has a security profile that restricts access to only the areas they need to do their job and only the staff for whom they have a responsibility. Connections to iTrent are encrypted, look for the  symbol in your browser.

To ensure the security of the information held in the system, you should also always remember to log out or lock your PC when you have finished using Self Service

**Q - Why can't I log in using my mobile device?**

A – You will need to amend the settings on your device:

- Android – Go to options and tick 'Request desktop site'
- IOS – Tap the URL and drag down to access 'Request desktop site'